12/7/84 56615-2

OREGON LABOR TRENDS

Prepared by Research and Statistics Section
STATE OF OREGON • EMPLOYMENT DIVISION • DEPARTMENT OF HUMAN RESOURCES
NOVEMBER 1984

OCTOBER INDICATORS

UNEMPLOYMENT RATE

Oregon	(Seas. Adj.)
Oct. '84	9.2
Sept. '84	8.8
Oct. '83	10.0
U.S.	
Oct. '84	7.4
Sept. '84	7.4
Oct. '83	8.8

WAGE AND SALARY EMPLOYMENT INDEX

Oregon	1977=100
Oct. 1984:	106.8
Sept. 1984:	106.0
Aug. 1984:	106.1
July 1984:	105.7
June 1984:	105.5

DIFFUSION INDEX

Oregon	
Oct. 1984:	54.3
Sept. 1984:	51.6
Aug. 1984:	55.8
July 1984:	51.9
June 1984:	53.9

PRODUCTION WORKER AVERAGE WEEKLY HOURS

Oregon	
Sept. 1984:	40.4
Aug. 1984:	38.9
Sept. 1983:	39.1

CONSUMER PRICE INDEX (CPI)

1967=100
ALL URBAN CONSUMERS

Portland MSA	
Sept. 1984	302.5
Yearly Change	+ 3.1%
U.S.	
Oct. 1984	315.3
Yearly Change	+ 4.2

Portland Hotline 221-4132

MONTHLY ECONOMIC ANALYSIS

Gary Barker

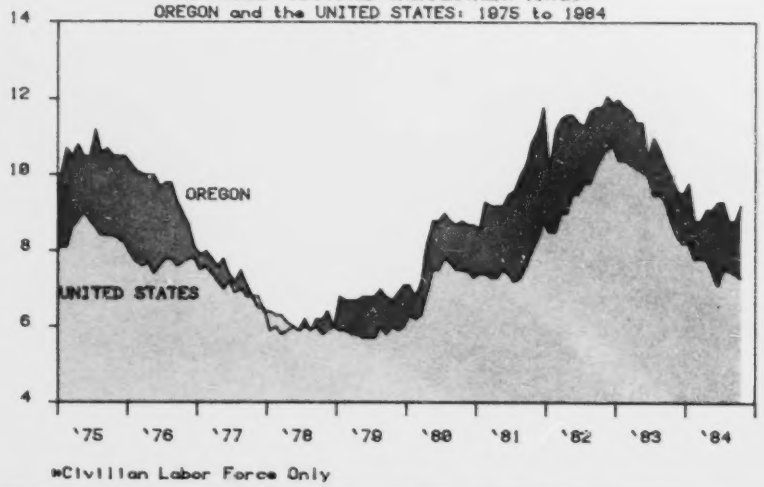
Results are in for October. The preliminary polls show Oregon's economy leaning towards higher unemployment along with a gain on the nonfarm employment side. A mixed bag? Let's look at the results.

Following a mostly predictable pattern, the state's raw, or unadjusted unemployment rate ended a steady nine month decline. Dropping steadily from January's 12.0%, raw unemployment bottomed out at 7.5% in September, only to climb back to 8.2% in October. Winter weather and, to a much lesser extent, market conditions slowed the wheels of progress in the northwest, a region of the U. S. where employment is most susceptible to changes in the weather. And to what degree did the natural and economic climate influence Oregon's October performance? The answer can be found in the unemployment rate adjusted for that seasonal variation and also via an "expected" employment count.

Seasonally adjusted unemployment would, all else being equal (ceteris paribus for the economists in the crowd), hold steady from month to month. The U. S. rate did. Oregon's did not.

The latest data for the nation showed the seasonally adjusted unemployment rate holding even at 7.4% of the civilian labor force. The lack of change fits the pattern of recent months, and comes as no surprise.

SEASONALLY ADJUSTED UNEMPLOYMENT RATES*
OREGON and the UNITED STATES: 1975 to 1984



*Civilian Labor Force Only

RESIDENT OREGON LABOR FORCE

	Oct. 1984 1/	Sept. 1984 2/	Change	% Change	Oct. 1983 5/
Civilian Labor Force 3/	1,340,000	1,333,800	+ 6,200	+ 0.5	1,339,400
Unemployment	109,800	99,400	+10,400	+10.5	116,800
Percent of Labor Force	8.2	7.5	xxx	xxx	8.7
Seasonally Adjusted Percent	9.2	8.8	xxx	xxx	10.0
Total Employment 4/	1,230,200	1,234,400	- 4,200	- 0.3	1,222,600

1/ Preliminary. 2/ Revised. 3/ Includes employed and unemployed individuals 16 years and older. Data are adjusted for multiple job-holding and commuting. 4/ Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, farm workers, and labor disputants. 5/ Due to revised estimating procedures between December 1983 and January 1984, data for 1984 and that of previous years are not strictly comparable.

NONAGRICULTURAL WAGE & SALARY EMPLOYMENT
(By Place of Work)

INDUSTRY	Oct. 1984 1/	Sept. 1984 2/	Oct. 1983	Change From Sept. 1984	Change From Oct. 1983
TOTAL 3/	1,017,200	1,011,500	989,000	5,700	28,200
Wage & Salary Employment Index 4/	106.8	106.0	103.9	xxx	xxx
Diffusion Index 5/	54.3	51.6	60.5	xxx	xxx
Total Manufacturing	203,700	207,700	195,500	-4,000	8,200
Durable Goods	145,100	147,300	137,200	-2,200	7,900
Lumber & Wood Products	65,800	67,400	65,500	-1,600	300
Logging & Sawmills	34,400	35,600	33,500	-1,200	900
Veneer & Plywood	17,000	17,200	18,000	- 200	- 1,000
Millwork & Structural Wood	8,800	8,900	8,300	- 100	500
Mobile Homes	1,600	1,700	1,800	- 100	- 200
Other Wood Products	4,000	4,000	3,900	0	100
Furniture & Fixtures	2,300	2,200	2,300	100	0
Stone, Clay, Glass, & Concrete	3,300	3,400	3,300	- 100	0
Primary Metals	8,600	8,800	7,600	- 200	1,000
Blast Furnaces, Iron & Steel	5,200	5,200	3,800	0	1,400
Nonferrous Metals	3,400	3,600	3,800	- 200	- 400
Fabricated Metals	10,200	10,400	9,700	- 200	500
Fabricated Structural Metals	4,700	4,900	4,300	- 200	400
Other Fabricated Metals	5,500	5,500	5,400	0	100
Machinery	16,400	16,100	14,900	300	1,500
Electrical Equipment & Supplies	13,400	13,300	10,900	100	2,500
Transportation Equipment	8,000	8,500	6,500	- 500	1,500
Instruments & Related Products	14,500	14,600	14,200	- 100	300
Miscellaneous Manufacturing	2,600	2,600	2,300	0	300
Nondurable Goods	58,600	60,400	58,300	-1,800	300
Food & Kindred Products	28,500	30,000	28,600	-1,500	- 100
Canning & Preserving	17,900	19,600	18,100	-1,700	- 200
Other Food Products	10,600	10,400	10,500	200	100
Textile Mill Products	1,800	1,800	1,700	0	100
Apparel	2,700	2,700	2,500	0	200
Paper & Allied Products	8,700	8,800	9,100	- 100	- 400
Printing & Publishing	11,000	11,100	10,500	- 100	500
Chemicals & Allied Products	2,200	2,300	2,200	- 100	0
Petroleum Refining	600	500	600	100	0
Rubber & Plastic Products	2,700	2,700	2,600	0	100
Leather Products	400	500	500	- 100	- 100

NONAGRICULTURAL WAGE & SALARY EMPLOYMENT
(By Place of Work)

INDUSTRY	Oct. 1984	Sept. 1984	Oct. 1983	Change From Sept. 1984	Change From Oct. 1983
(cont.)					
Total Nonmanufacturing	813,500	803,800	793,500	9,700	20,000
Mining & Quarrying	2,200	2,200	1,800	0	400
Construction	30,400	31,200	30,100	- 800	300
Transportation, Communications, & Utilities	55,800	55,600	56,000	200	- 200
Transportation	33,800	33,400	32,700	400	1,100
Railroad	5,400	5,400	5,200	0	200
Trucking & Warehousing	17,900	17,500	17,300	400	600
Other Transportation	10,500	10,500	10,200	0	300
Communications	13,700	13,800	14,900	- 100	- 1,200
Utilities	8,300	8,400	8,400	- 100	- 100
Trade	256,000	256,300	247,900	- 300	8,100
Wholesale Trade	65,200	65,300	63,500	- 100	1,700
Durable Goods	37,400	37,600	37,100	- 200	300
Nondurable Goods	27,800	27,700	26,400	100	1,400
Retail Trade	190,800	191,000	184,400	- 200	6,400
General Merchandise	25,700	24,800	24,300	900	1,400
Food Stores	28,900	28,700	28,300	200	600
Auto Dealers & Service Stations	23,900	24,000	23,100	- 100	800
Other Retail Trade	112,300	113,500	108,700	-1,200	3,600
Finance, Insurance, & Real Estate	66,900	67,300	65,400	- 400	1,500
Banking & Credit Agencies	23,100	23,500	23,400	- 400	- 300
Other Finance, Insurance, & Real Estate	43,800	43,800	42,000	0	1,800
Services	203,800	203,300	195,800	500	8,000
Hotels & Personal Services	24,400	24,800	23,200	- 400	1,200
Health Services	68,800	68,800	67,300	0	1,500
Other Services	110,600	109,700	105,300	900	5,300
Government	198,400	187,900	196,500	10,500	1,900
Federal Government	29,700	29,800	29,700	- 100	0
State Government	53,000	48,900	53,700	4,100	- 700
Education	22,700	18,100	23,000	4,600	- 300
Other State	30,300	30,800	30,700	- 500	- 400
Local Government	115,700	109,200	113,100	6,500	2,600
Education	74,200	67,400	71,800	6,800	2,400
Other Local	41,500	41,800	41,300	- 300	200
Labor-Management Disputes	900	900	1,400	0	- 500

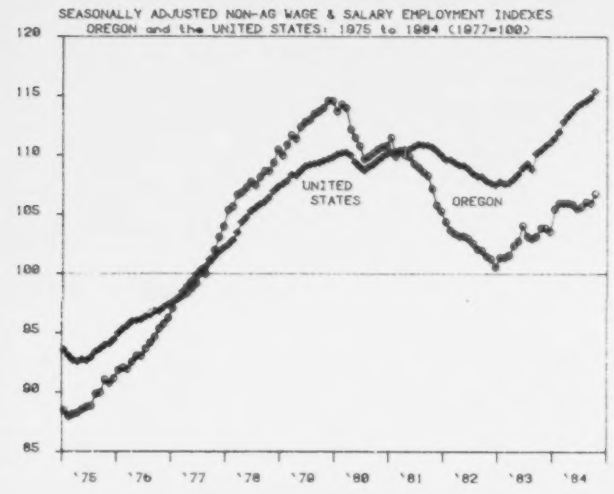
1/ Preliminary

2/ Revised

3/ Includes full and part-time nonfarm wage and salary workers in pay periods including the 12th of the month. Proprietors, self-employed, private household workers and armed forces excluded. NOTE: Estimated in cooperation with the U.S. Bureau of Labor Statistics and Employment and Training Administration. All data are based on the 1972 Standard Industrial Classification (SIC) codes as amended by the 1977 supplement.

4/ Total nonagricultural wage and salary employment, seasonally adjusted, and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774,300) and that of 1977 (936,900).

5/ The diffusion index is the percentage of a selected group of 43 industries showing an increase in seasonally adjusted employment. Half of those industries showing no significant change (less than 1/2 of 1%) are counted as increasing.



In Oregon the rate rose to 9.2% in October from September's 8.8%, not a dramatic jump and not likely to be the sign of a weakening economy. Most important in watching any economic indicator is detecting the emergence of patterns. None are evident. Over the first 10 months of 1984, Oregon's seasonally adjusted unemployment rate has ranged from 8.8% to 9.8% for a percentage spread of 1.0 point. During the last 5 years, the annual spread has averaged twice that amount, symptomatic of an economy in a state of transition. While the rate remains high, higher than good economic health dictates, it has displayed a degree of stability not evident in the recent past.

On the other side of the labor force coin is employment, both agricultural and nonagricultural. Farm employment, not surprisingly, showed a significant drop in October in response to the completion of harvest activities and a change in the weather. Nonfarm employment, meanwhile, exhibited considerable strength during the October survey period, as evidenced by the rise of .8 of a point in the wage and salary employment index. The normal seasonal expectation for October would be a reduction of about 3,000 nonfarm workers, rather than the reported increase of 5,700.

Lumber and wood products manufacturers highlighted the manufacturing employment picture. Though declines were uniformly evident throughout wood products, and even though several mills recently closed permanently, October's performance was good. Measured by the change in seasonally adjusted data, lumber and wood products ranked highest among the manufacturers and was behind only trade and services when all major industries are considered.

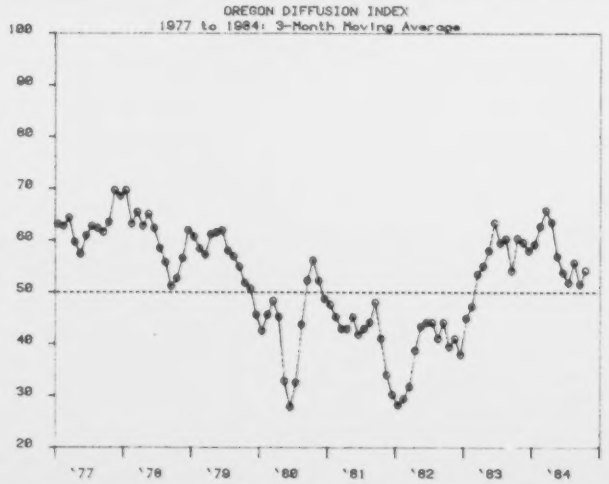
Certainly, Oregon's wood products industry continues to experience a tough transitional phase in which the casualty count is high. Nevertheless, over 2,000 employers are still operating in Oregon's lumber and wood products industry. These survivors have weathered the recession and many will undoubtedly muster some additional strength from the recent timber legislation. Let's briefly review that measure.

What is the timber contract relief bill? It is a bill the President recently signed into law allowing those employers who signed expensive federal timber contracts in the late 1970s and early 1980s to buy their way out. Up to 55% (a maximum of 200 million board feet) of their purchase can be returned to the federal government by paying a buy out fee. Included in the provisions of the bill are stipulations making larger companies pay a higher fee and, to alleviate concern from the south, a limit on the total volume (5.2 billion board feet) that can be sold in any one year. The bill also discourages future speculative bidding and includes a cash down payment, periodic payment provision for future contracts. Employers have until April 1985 to decide what to do.

The bill will allow some of the relief implied in the title. Though too late for many firms, the legislation will undoubtedly have a decisive impact on many still struggling for survival. While the full impact will not be evident for years to come, a good preview of the future will be apparent in the spring as the relief requests are counted.

Moving from lumber and wood, the other durable goods sector did not show much change in October. However, this sector is certainly one to keep watching. A succession of Japanese firms recently announced plans to locate in Oregon. This good news shows the results of efforts aimed at attracting industry, such as the repeal of the unitary tax and any real or perceived negative implications of that tax. It also reflects Oregon's comparatively inexpensive property values and the availability of skilled workers. This points to future employment expansion in the state as do recent announcements by the Atlantic Richfield Company, whose projects for the Alaskan pipeline could add over 1,000 jobs in Oregon.

Much of the employment "action" in October was concentrated in trade. An expected ebb in retail sales this fall among merchants was less than usual. In fact, much of the strength evident in trade was in the general merchandise component, where 900 workers were added over the month. If that early strength prevails, and if early reports from retailers are accurate, the 1984 holiday



season should be a good one. From the standpoint of temporary holiday hiring, the results won't be known for a while, because more than 50% of the 6,000 plus extra employees are not added to the rolls until December.

The services sector also performed well in October. Employment went up 500 over the month instead of taking a normal seasonal drop of about 1,500. Much of the change was concentrated in the other services category, where private education, temporary help agencies, and business services all reported gains. Most notable is the comparison with services employment a year ago, which shows a resounding 8,000 increase.

Elsewhere in nonmanufacturing, employment generally tracked along normal seasonal patterns. Oregon's besieged construction industry, however, continues to struggle with no immediate relief in sight. Mortgage rates are still too high to spark much activity, and a large volume of vacant homes remain on the market.

Nationally, the construction picture appears much better. For the U. S., housing starts could rise to 1.8 million in 1984, up strongly from the 1.1 million experienced just two years ago. Comparing prerecessionary (1979) employment levels to recent counts (Sept. 1984) tells the story. U. S. construction employment went up 4.2% over that period. Oregon showed a bitterly disappointing drop of 41.1%.

October's data presents something of a mixed bag with both unemployment and nonfarm employment going up. However, the key is not what happened this month, but the trend evident over time. Remember the anti "quick fix" sentiment out of the not too distant past? Well, that which we didn't want we didn't get. The result is evident in the fact that October 1984 employment stood 70,000 below that of October 1979. Yet the recent 1984 pattern depicts an economy that has broken the grips of the recession and demonstrated stability. Given the recent flurry of announcements by companies planning to locate in the state, the timber relief bill, plus an expectation of continued national economic prosperity, Oregon should continue to show slow growth.□

COMPARISON OF SELECTED OCCUPATIONS
1979-1982 WAGE AND SALARY EMPLOYMENT

The "Losers" Occupation	Employment 1979	1982	Loss	Pct. Loss
Bookkeeper, Hand	15,193	13,100	- 2,093	-13.77
Bkpng/Billing Mach Op	2,164	1,335	- 829	-38.30
Brick Layer	1,436	291	- 1,145	-79.73
Carpenter	9,310	5,361	- 3,949	-42.41
Cement Mason	1,081	515	- 566	-52.35
Chain Offbearer	5,656	4,379	- 1,277	-22.57
Core Layer/Sheet Turner	1,331	798	- 533	-40.00
Cut-Off Saw Operator	1,156	679	- 477	-41.25
Drafters	4,115	2,562	- 1,553	-37.73
Electricians	5,438	4,226	- 1,212	-22.28
Faller &/or Bucker	3,036	1,888	- 1,148	-37.80
Heavy Equip Operator	6,724	4,466	- 2,258	-33.57
Machine Tool Operator	1,350	932	- 418	-30.95
Machinist	3,189	2,207	- 982	-30.78
Mechanic Automotive	9,707	7,052	- 2,655	-27.34
Plumber &/or Pipefitter	4,263	2,991	- 1,272	-29.83
Real Estate Broker	1,317	717	- 600	-45.55
Truck Driver	25,029	20,580	- 4,449	-17.77
Typist	13,479	11,251	- 2,228	-16.52
Veneer Grader	2,165	1,184	- 981	-45.30
Welders & Flamecutters	6,786	4,550	- 2,236	-32.95
TOTAL	123,925	91,064	-32,861	

The "Winners" Occupation	Employment 1979	1982	Gain	Pct. Gain
Bartender	7,116	10,572	3,456	48.57
Child Care Attendant	267	510	243	91.01
Computer Operator	1,346	1,617	271	20.13
Computer Programmer	1,674	1,946	272	16.25
Counter Attendant	5,545	8,590	3,045	55.00
Dentist	232	573	341	146.98
Food Prep Fast Food	6,135	10,534	4,399	71.70
Instructor Reducing	101	331	230	227.72
Data Entry Keyer	3,983	4,682	699	17.55
Electrical Engineer	3,672	3,931	259	7.05
Electronic Technician	2,831	3,390	559	19.75
Lawyer	1,881	2,331	450	23.92
Mach Tool Op Numrcl Cntrol	328	403	75	22.87
Manager Restaurant	2,578	3,258	680	26.38
Mnual Art/Music Rec Thrpst	99	239	140	141.41
Masseur or Masseuse	64	168	104	162.50
Nurse Professional	11,738	15,171	3,433	29.25
Occupational Therapist	117	205	88	75.21
Physician & Surgeon	2,150	2,642	492	22.88
Psychiatric Aide	1,215	1,967	752	61.89
Public Rel Practitioners	603	813	210	34.83
Sales Agent Insurance	2,642	3,857	1,215	45.99
TOTAL	56,317	77,730	21,413	

OCCUPATIONAL IMPACTS OF THE RECESSION

Dave Allen

It is no secret that between 1979 and 1982 Oregon lost almost 100,000 jobs. The recession in Oregon was long and deep. We are just beginning to understand how Oregon's economic and occupational landscape has changed as a result of the recession. In pre-recession days Oregon's economy was characterized by high inflation, low interest rates, rapid population growth, and an increasing number of jobs created by the demand for housing. How things have changed! The post recession Oregon is just forming, but low inflation, high interest rates, slow population growth, a strong dollar, and increased competition in lumber and wood products are all making new job development difficult in Oregon. What will be the new labor needs of the post-recession?

Oregon's economic transition in occupational terms can be seen by looking at the occupational "losers" and "winners" of the recession. The losers fall into three major groups. First, there are those occupations affected by the decline in lumber and wood products. These include chain offbearers, cut-off saw operators, fallers and buckers, and veneer graders. A second group of losers are related to the downturn in construction activity. These include bricklayers, carpenters, cement masons, electricians, plumbers and pipefitters, welders and flamecutters. The employment decline in the third group of occupations is not as simple to explain. A combination of automation and changing demand reduced employment for hand bookkeepers, bookkeeping and billing machine operators, drafters, machine tool operators, machinists, automotive mechanics, and typists. The demand for these occupations has not only been affected by the use

of computers, but also the job duties have been transformed. It seems that as typists become word processing operators, and drafters become computer assisted designers, industry does not need the same number of workers as before.

Gains in productivity may allow for the reduction of personnel. However, the effects of high tech automation and computer applications are not necessarily a reduction in employment. For example, the need for electrical engineers, electronic technicians, computer programmers, computer operators, data entry keyers, and numerical control machine tool operators increased between 1979 and 1982. These occupations grew during the recession because of the increasing use of computers. This increase is, of course, small in comparison to the jobs lost, but this comparison does not take other factors into account. For example, many of the jobs created by high tech industries are not associated with either computers or electronics. The point of the comparison between high tech losers and winners is that there has been a shift both in demand and in the job skills needed by workers. The machine tool operator lost ground (418 job loss), but the numerical control machine tool operator gained (75 new jobs). Whether the net loss of 343 jobs in the process means that computerization will eliminate more jobs than it creates cannot be answered here.

Most of the occupational winners are not, in fact, related to high tech but rather to service and trade industries. These occupations include bartenders, counter attendants, fast food workers, and restaurant managers. In fact, eating and drinking places have created more jobs since 1974 than any other industry.

Another group of occupational winners are the result of changing social conditions and attitudes. The dual income family has increased the need for child care, as well as the desire to eat out more often. The increasing emphasis on better physical health has increased the need for such occupations as weight reducing instructors, recreation therapists, and masseur/masseuses, to name just a few of those who help us shape up.

Three professional occupations on the winners list deserve some special attention. The "increased need" for dentists, doctors, and lawyers is not what it appears to be. Historically, these three occupations have been characterized by high self-employment. Since 1970, however, there has been a strong shift towards wage and salary employment. The following data taken from the 1970 and 1980 Oregon Census shows this trend.

	% Self-Employed		
	1970	1980	Difference
Dentists	88	68	-20
Physicians	56	36	-20
Lawyers	68	41	-27

There are a number of reasons for this shift towards wage and salary employment. All three of these professional groups have been faced with an increasing surplus of workers. One response to this surplus has been the increased use of shared facilities and incorporation. The recession and changes in medicare payments increased pressure to lower the cost of health care. The trend towards wage and salary employment is likely to continue, but it does not mean that there is an overall need for more dentists, physicians, or lawyers.

The recession has changed the economic and occupational landscape of Oregon. During the recession many persons lost jobs in occupations related to Oregon's natural resource based economy. Fundamental changes in the economy make it unlikely that pre-recession employment levels for these occupations will ever again be reached. Employment gains did, however, take place in many occupations during the recession. As we have seen, the need to increase productivity, cut labor costs, and diversify Oregon's economy has led to more jobs in high tech and service occupations. More important, perhaps, is the increased awareness the recession has given all of us of the skills required to survive in the changing labor market.□

THE EMPLOYER'S CORNER

Dorothy Monnier

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HOURS AND EARNINGS

Mike Staten

The most notable change in hours and earnings between August and September was a $12.79 gain in average weekly earnings, a direct result of increased average weekly hours in many manufacturing industries. The major exceptions to this trend were in furniture & fixtures, other food products, millwork & structural wood, and mobile homes.

The durable goods industries overall posted a 1.4 gain in average hours in September, principally on the strength of lumber and wood products. The number of wood products production workers, however, remained virtually unchanged at 60,400. The decline in furniture & fixtures weekly hours came in response to a gain in the number of employees, but each worked fewer average hours.

On the nondurable side of manufacturing, the number of employees in bakery products increased, pushing average weekly hours down. Substantial declines in the number of overtime hours worked in grain mill products and beverages also added to the 1.1 hour drop in average weekly hours.

In the construction industry, activities began to taper off in September with the termination of many heavy construction projects. As a result, weekly earnings in the construction industry fell.

September's performance, compared with that of one year ago, showed that average weekly hours were up 1.3 for total manufacturing. This gain was shared equally between durable and nondurable goods industries. The strongest gain in durable goods came in logging & sawmills, where the average workweek rose 2.3 hours and the number of production workers increased by 1,600. The largest nondurable goods gain came in canning and preserving, which added 4.6 hours per week but lost 1,200 production workers. Finally, 8,700 more production workers were "on the books" this September, with a total manufacturing payroll which was nearly $7.1 million or 11.8%, greater than a year ago.□

AVERAGE HOURS AND EARNINGS OF OREGON INDUSTRIAL PRODUCTION WORKERS 1/

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Sept 2/ 1984	Aug. 3/ 1984	Sept. 1983	Sept 2/ 1984	Aug. 3/ 1984	Sept. 1983	Sept 2/ 1984	Aug. 3/ 1984	Sept. 1983
TOTAL MANUFACTURING 4/	$417.74	$404.95	$395.69	40.4	38.9	39.1	$10.34	$10.41	$10.12
Durable Goods	438.45	425.81	419.75	40.9	39.5	39.9	10.72	10.78	10.52
Lumber & Wood Products	457.25	435.63	433.87	40.5	39.0	39.3	11.29	11.17	11.04
Logging & Sawmills	498.93	468.00	465.24	41.2	39.0	38.9	12.11	12.00	11.96
Veneer & Plywood	457.78	438.99	426.66	40.8	39.8	39.0	11.22	11.03	10.94
Millwork & Struct Wood	330.81	340.95	348.53	38.2	39.1	41.1	8.66	8.72	8.48
Mobile Homes	269.60	283.94	307.13	33.7	34.5	41.9	8.00	8.23	7.33
Other Wood Products	454.99	408.06	426.13	41.4	37.3	39.9	10.99	10.94	10.68
Furniture & Fixtures	289.00	299.75	248.07	35.9	37.8	32.9	8.05	7.93	7.54
Primary Metals	478.19	504.48	516.60	41.8	41.9	42.8	11.44	12.04	12.07
Fabricated Metals	403.01	406.61	388.55	40.1	40.1	40.9	10.05	10.14	9.50
Machinery	422.47	406.38	401.25	40.7	39.0	39.3	10.38	10.42	10.21
Nondurable Goods	364.26	351.56	338.35	39.0	37.4	37.1	9.34	9.40	9.12
Food & Kindred Products	298.70	277.61	274.00	39.2	36.1	36.1	7.62	7.69	7.59
Canning & Preserving	265.73	230.16	229.80	39.9	35.3	35.3	6.66	6.52	6.51
Other Food Products	387.62	398.32	403.20	37.2	38.3	38.4	10.42	10.40	10.50
Textile Mill Products	223.28	218.02	216.00	37.4	35.8	36.0	5.97	6.09	6.00
Apparel	208.87	204.50	204.28	37.1	37.8	37.9	5.63	5.41	5.39
Paper & Allied Products	591.60	570.63	549.18	42.5	42.3	40.5	13.92	13.49	13.56
Printing & Publishing	444.21	433.18	396.77	36.5	35.8	35.3	12.17	12.10	11.24
Construction 4/	538.56	552.68	528.17	37.9	37.7	35.4	14.21	14.66	14.92
Communications & Utilities 5/	513.32	498.48	467.68	41.0	40.2	39.4	12.52	12.40	11.87
Trade 5/	293.95	293.60	285.23	34.3	34.5	34.2	8.57	8.51	8.34
Wholesale Trade	383.16	392.27	384.00	37.2	37.9	37.5	10.30	10.35	10.24
Retail Trade	250.70	245.67	235.95	32.9	32.8	32.5	7.62	7.49	7.26
Banking & Insurance	272.48	267.11	264.32						
State & Local Government	341.67	352.79	336.86						

1/ Figures are average gross hours and earnings of full and part-time worked or paid for, including overtime and shift premium pay. Prepared in cooperation with the U.S. Department of Labor. All data are based on the 1972 Standard Industrial Classification (SIC) codes.
2/ Preliminary
3/ Revised
4/ Data for production workers only and exclude administrative, supervisory (above working foremen), technical, sales and office personnel.
5/ Data for nonsupervisory employes only, excluding proprietors and executive personnel. Data for retail trade excludes eating and drinking places.

LABOR MARKET INFORMATION PROGRAM

Tom Lynch

The "roots" of Labor Market Information (LMI) date back at least to the Great Depression when the need for data to assess the health of the national economy became vital. At that time the federal government, working with the states, initiated a data collection program to accurately determine the number of workers employed in various industries. The Wagner-Peyser Act of 1933 required LMI to support programs authorized under the act. This early reference to LMI has since been followed by several other pieces of federal legislation which reinforced and expanded the role of LMI in high priority federal programs. The latest act specifying a significant contribution from LMI was the Job Partnership Training Act (JTPA) of 1982. A portion of this Act requires the Secretary of Labor to develop a "comprehensive system of labor market information on a national, regional, state, local or other appropriate basis." Specifically, the Act requires the Secretary of Labor to work through the state governors to implement a system that meets a broad array of user needs. According to the Act, the system should provide information and analysis for such things as JTPA program planning, economic development, funding allocations, job placement and plant site locations.

The diversity of activities specified for the LMI programs requires a definition to encompass all of the functions mentioned above. This definition should be complete and easily understood by the general public. Perhaps the best definition was coined in 1970 by Joseph Epstein of the U.S. Department of Labor. He said:

> "The body of Labor Market Information refers to detailed and comprehensive information on the magnitude of dynamics of employment and the factors that influence them, the characteristics of the labor force, and the processes that brings workers and jobs together. It refers to the economic intelligence used to assure the efficiency of the labor market at all levels. Such factors as labor demand/supply, employment/unemployment ... are necessary for program development, policy guidance and legislative enactment".

This definition provides a goal which all federal/state LMI programs should hope to achieve. However, the level of development varies across the states in the areas of Labor Force, Occupational and Job Search Information. Of these three areas, the labor force information programs are the best understood and most technically developed. Occupational information has made significant progress in the 1970s and should reach a high state of development by 1990. Job search information is still in its infancy, but current funding priorities will probably slow any further progress in this area.

Because of their unique historical relationships with the U.S. Department of Labor, the State Employment Security Agencies are the nation's principal source of information on employment and jobs. Their LMI units have developed over the last 40 years the expertise and data sources to address most of the mandates of the Job Training Partnership Act of 1982. Within the Oregon LMI Unit there are specific programs which address the three areas of labor force, occupational demand/supply and Job Search Information. To meet the JTPA legislative requirements for a "comprehensive" Labor Market Information system at the federal, regional, state and local levels, the Bureau of Labor Statistics and the Oregon Employment Division share the funding of these LMI programs. The partnership has worked well and gained Oregon's LMI programs national recognition as leaders in their fields. The programs are:

- -Current Employment Statistics (CES)
- -Local Area Unemployment Statistics (LAUS)
- -Occupational Employment Statistics (OES)
- -Occupational Program Planning System (OPPS)

The partnership that exists between the federal and state governments assigns definite responsibilities to each participant in the operation of these programs. The U.S. Department of Labor oversees the technical responsibility for sampling, data collection, analytical techniques and publication standards for three of the four LMI programs (CES, LAUS, and OES). State LMI responsibilities for these programs include data collection and followup, preparation of the estimates, and the analysis, publication and delivery of data to the users.

Each of the four programs will be discussed in detail in future issues of Oregon Labor Trends.□

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